

# **Right Person. Right Seat.**

**A guide to getting the right people on the bus.**



# Overview

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- ☐ **Traction/EOS**
- ☐ **Core Values**
- ☐ **Accountability Chart**
- ☐ **Get It. Want It. Capacity to Do It.**
- ☐ **Delegate and Elevate**
- ☐ **5-5-5**



# The 4 People Issues

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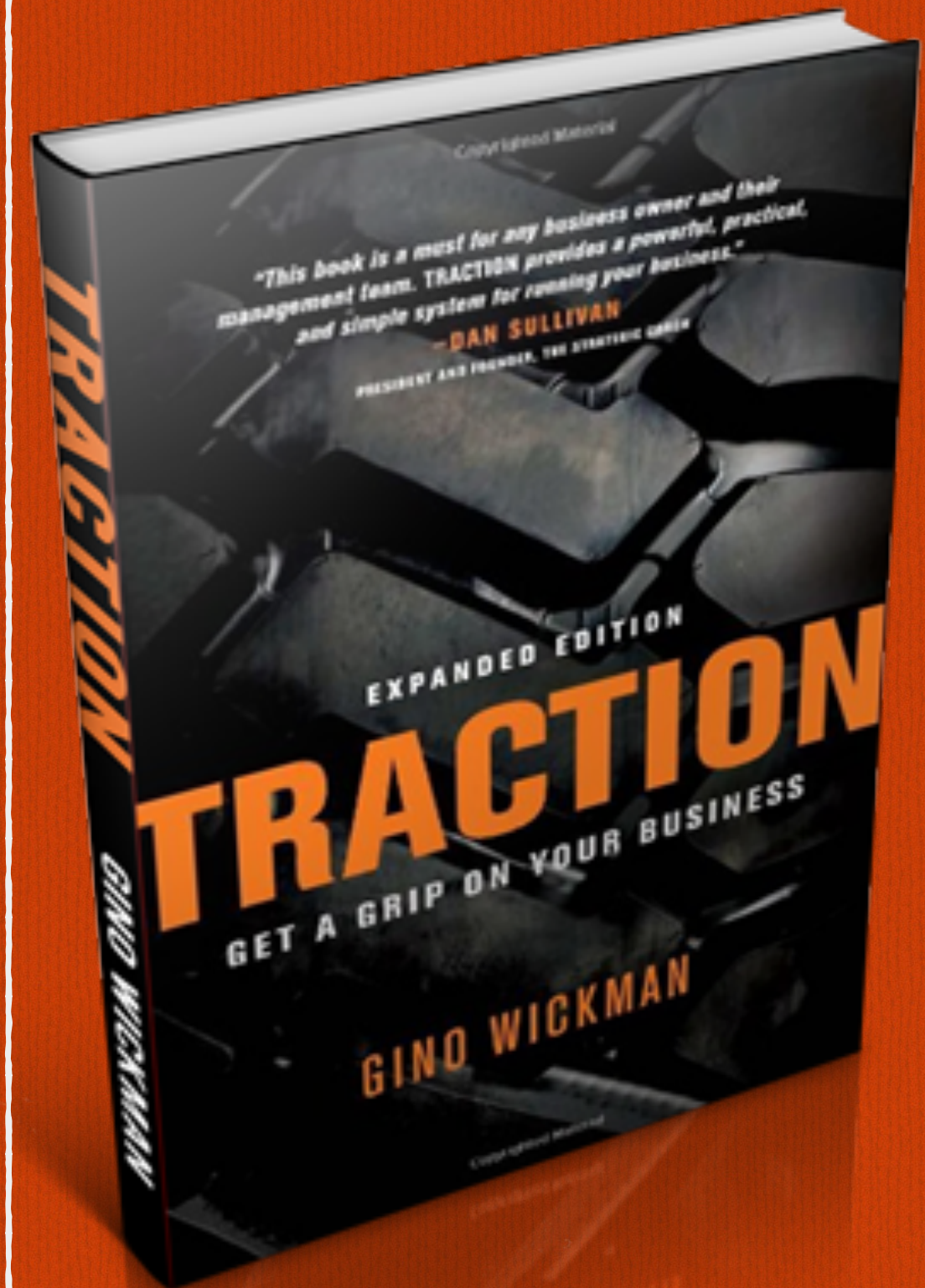
- ☐ Right person. Right seat.
- ☐ Right person. Wrong seat.
- ☐ Wrong person. Right seat.
- ☐ Wrong person. Wrong seat.



# Traction

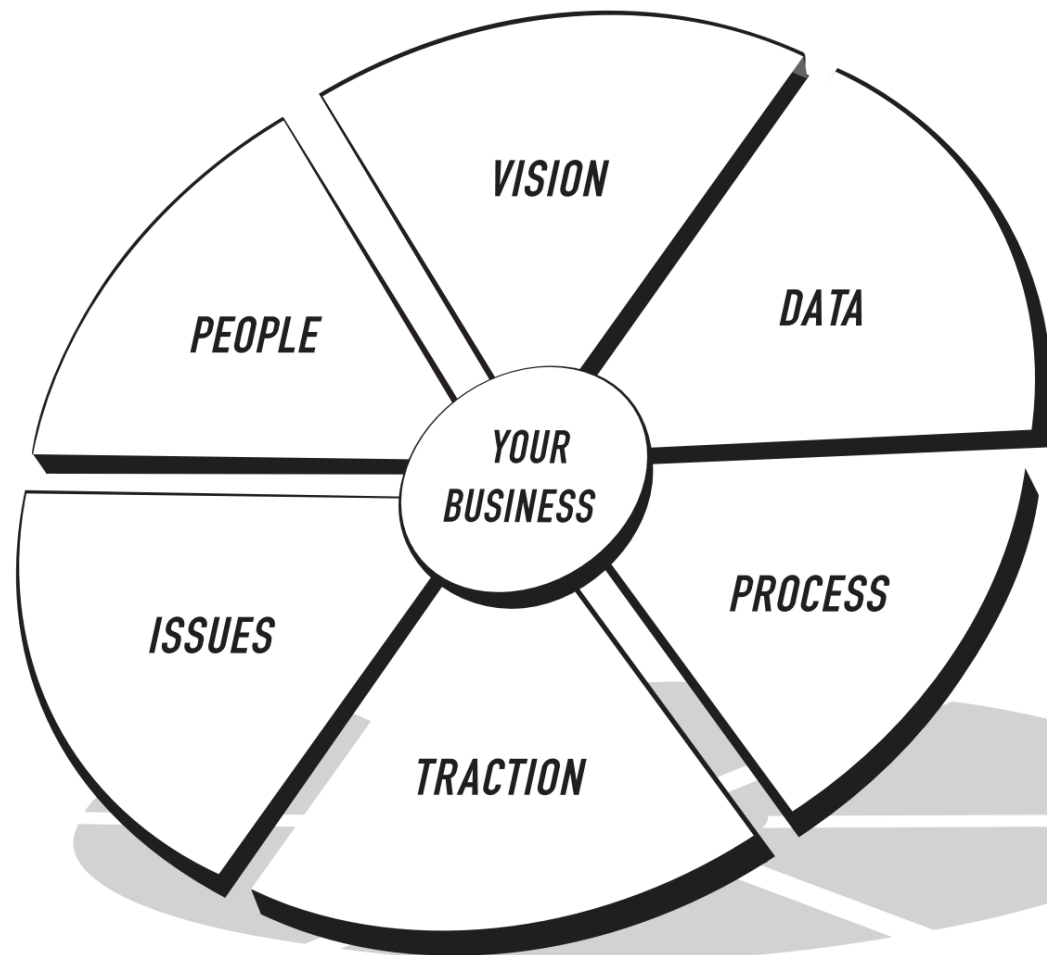
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Gino Wickman





# Traction Process



- ☐ Vision
- ☐ Data
- ☐ Process
- ☐ Traction
- ☐ Issues
- ☐ People



- ☐ **Hungry for Achievement**
- ☐ **Enthusiastic, Energetic, Tenacious, and Competitive**
- ☐ **Accountable**
- ☐ **Service the Customer Above All Else**
- ☐ **Work Hard**
- ☐ **Never Satisfied**
- ☐ **Continuous Self-Improvement**



- ☐ **Help First**
- ☐ **Exhibit Professionalism**
- ☐ **Encourage Individual Initiative**
- ☐ **Growth Oriented**
- ☐ **Treat Everyone with Respect**
- ☐ **Have Creativity, Dreams, and Imagination**
- ☐ **No Cynicism**



- ☐ **Humbly Confident**
- ☐ **Fanatical Attention to Consistency and Detail**
- ☐ **Exhibit Loyalty and Commitment**
- ☐ **Understand the Value of Reputation**
- ☐ **Fun**
- ☐ **Fair**
- ☐ **Encourage Teamwork**



# Creative Cakes' Core Values

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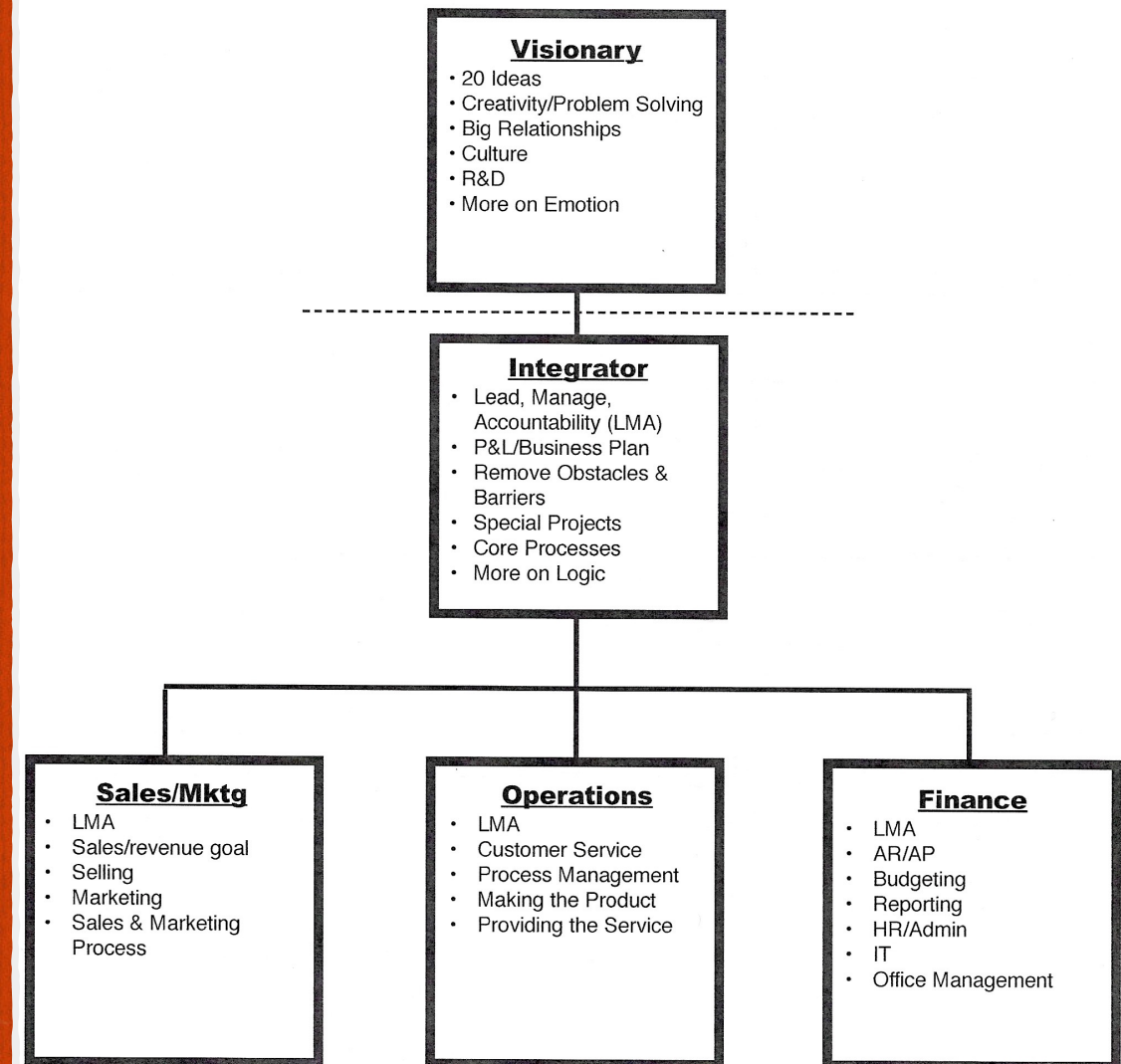
- ☐ Make the Next Person Successful
- ☐ Go the Extra Mile
- ☐ Generate Positive Energy
- ☐ Act with Reputation in Mind



# Accountability Chart

It's not an Org Chart!

## THE ACCOUNTABILITY CHART



Entrepreneurial Operating System®

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# **Accountability Chart**

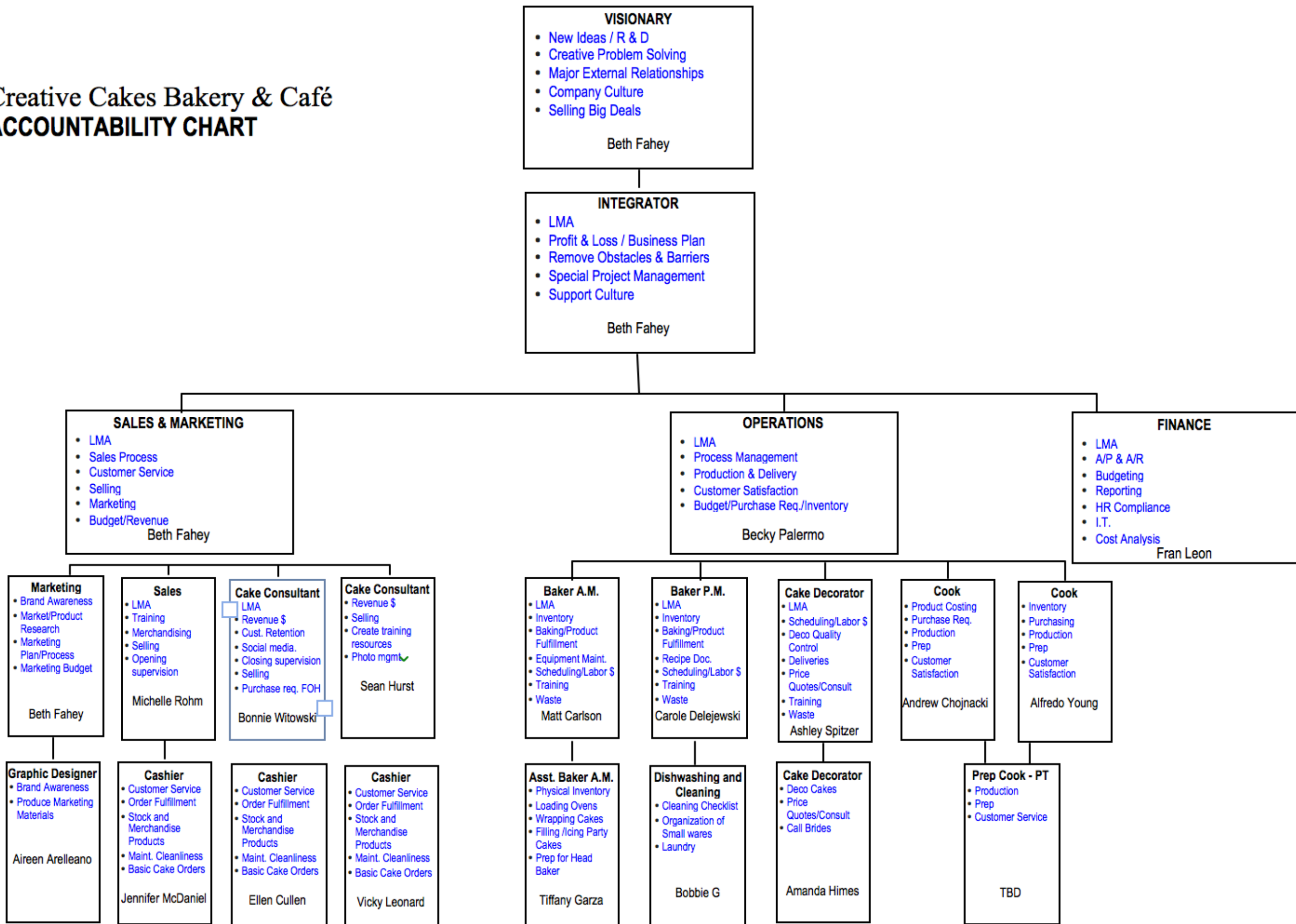
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- ☐ **Clarifies Roles and Responsibilities**
- ☐ **5 Tasks - main responsibilities**
- ☐ **Boxes are about the seat, not the person**

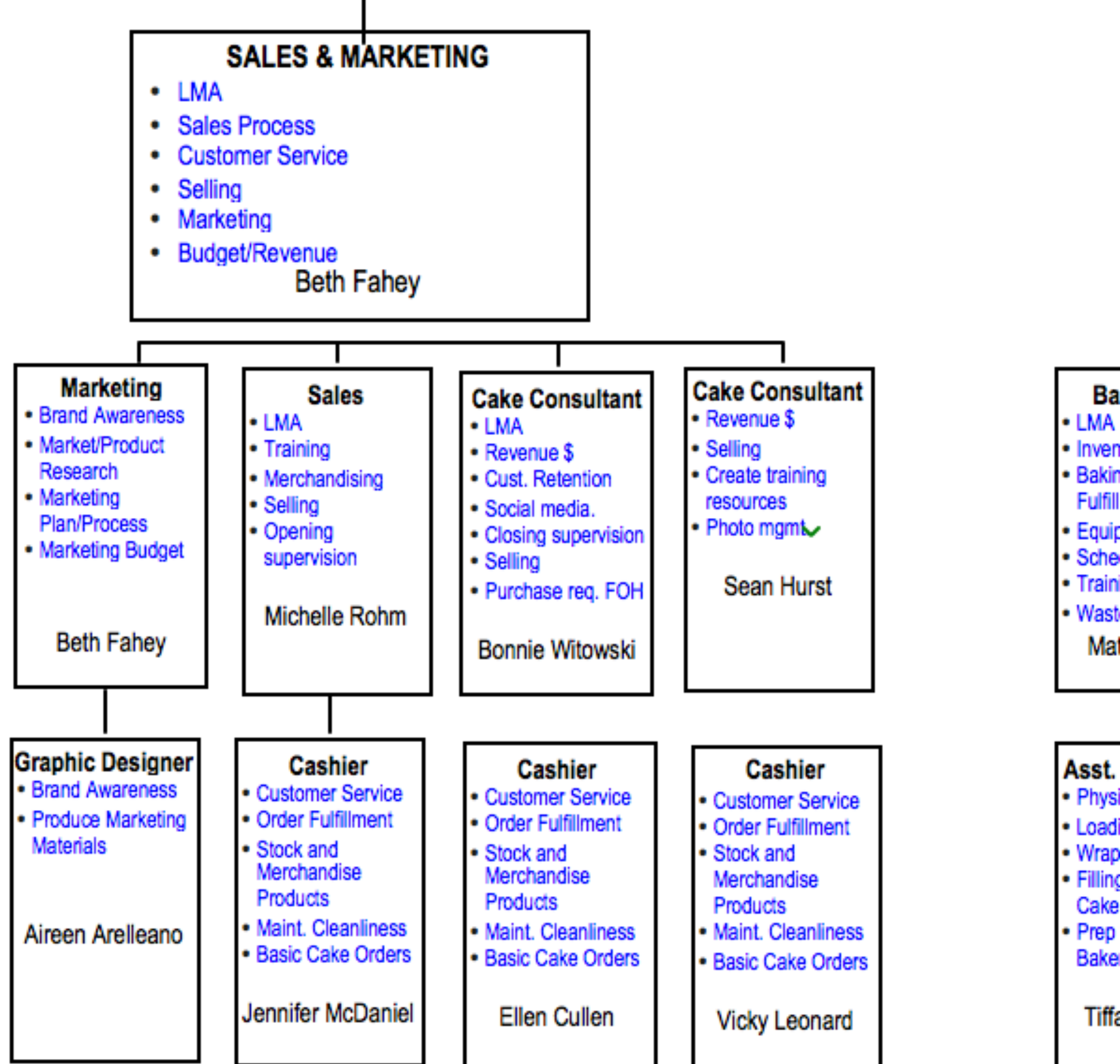


# Creative Cakes Bakery & Café

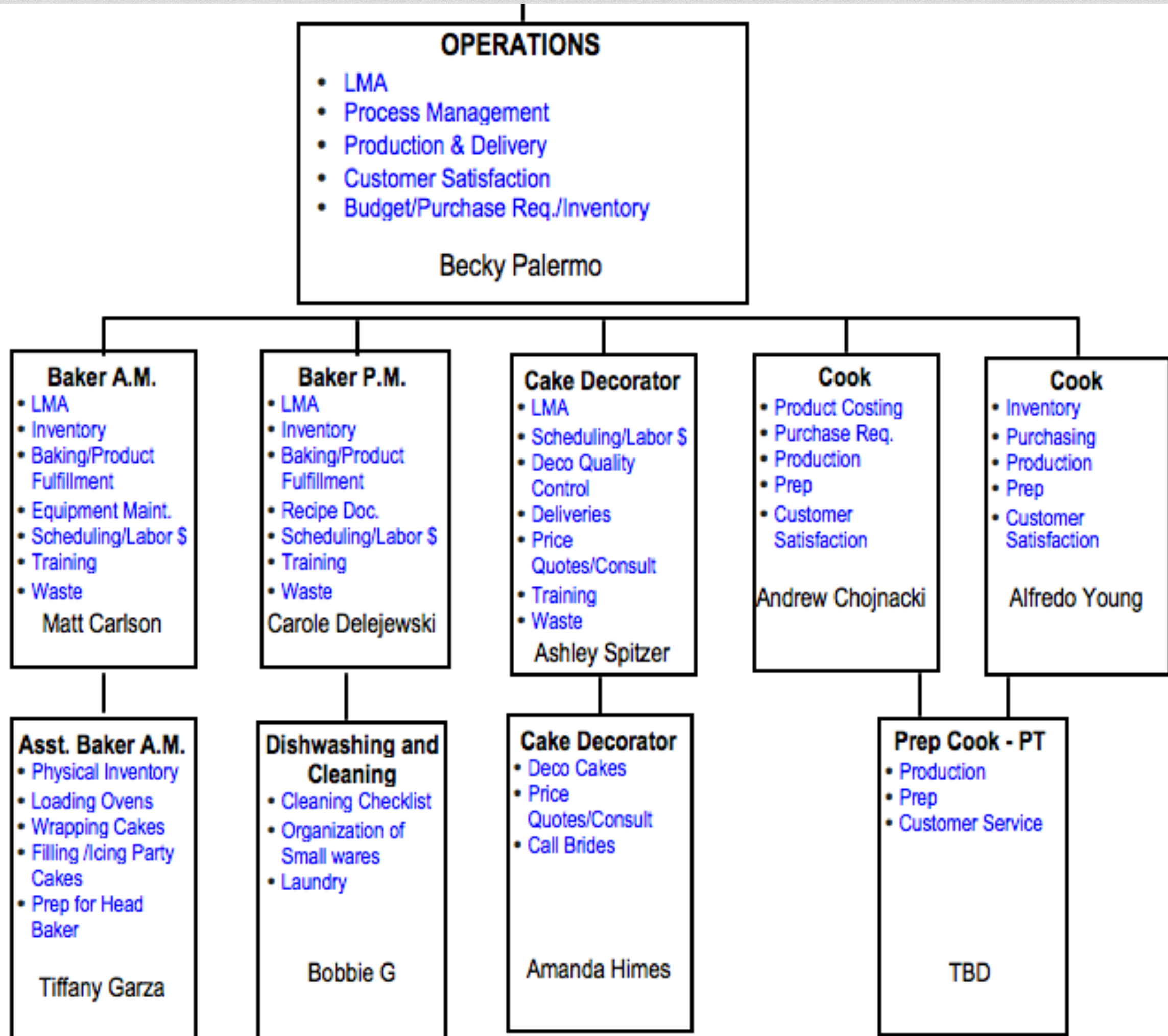
## ACCOUNTABILITY CHART













## FINANCE

- LMA
- A/P & A/R
- Budgeting
- Reporting
- HR Compliance
- I.T.
- Cost Analysis

Fran Leon



# Get It. Want It. Capacity to Do It.

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“Yes” on all.





# Gets It.

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- ☐ **Neurons connect?**
- ☐ **Understands the ins and outs of the position.**
- ☐ **Not everyone gets it.**



# **Wants It.**

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- ☐ **Genuinely wants to do the job.**
- ☐ **Has to want to do it on their own.**
- ☐ **Capacity  $\neq$  Want**



# Capacity to Do It.

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- ☐ Possesses the mental, physical, spiritual, knowledge, and emotional capacity to do the job.
- ☐ Can you wait?



# The People Analyzer

When in doubt, pull it out.

## THE PEOPLE ANALYZER™

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Reputation in Mind	Gets It	Wants It	Capacity to Do It		
Jennifer	+	+	+/-	+/-	✓	✓	✓		
The Bar									

Rating: + +/- -



Entrepreneurial Operating System®

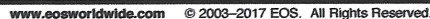
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Toolbox



# THE PEOPLE ANALYZER™

**Rating:**    +    +/-    -



## Toolbox

# THE PEOPLE ANALYZER™

## THE PEOPLE ANALYZER™



# The Bar

## THE PEOPLE ANALYZER™

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Reputation in Mind	Gets It	Wants It	Capacity to Do It		
Jennifer	+	+	+/-	+/-	✓	✓	✓		
Bill	+/-	+/-	+	+/-		✓			
Enrique	+	+	+	+	✓	✓	✓		
Molly	+	+	+	+	✓	✓			
Mary	-	+/-	-	-	✓	✓	✓		
Phil	+/-	+/-	-	-					
<b>The Bar</b>									

- ☐ Setting the bar
- ☐ Exceptions to the rule
- ☐ Communicating expectations



# Who is a core values fit?

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Integrity	Get It	Wants It	Capacity to Do It		
Jennifer	+	+	+/-	+/-	✓	✓	✓		
Bill	+/-	+/-	+	+/-		✓			
Enrique	+	+	+	+	✓	✓	✓		
Molly	+	+	+	+	✓	✓			
Mary	-	+/-	-	-	✓	✓	✓		
Phil	+/-	+/-	-	-					
The Bar									

Rating: + +/- -

☐ Must have 3 “+” and 1 “+/-”







# Who has GWC?

## THE PEOPLE ANALYZER™

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Reputation in Mind	Gets It	Wants It	Capacity to Do It		
Jennifer	+	+	+/-	+/-	✓	✓	✓		
Bill	+/-	+/-	+	+/-		✓			
Enrique	+	+	+	+	✓	✓	✓		
Molly	+	+	+	+	✓	✓			
Mary	-	+/-	-	-	✓	✓	✓		
Phil	+/-	+/-	-	-					

- ☐ Must be a “yes” on all 3
- ☐ Exceptions to the rule







# Pass or Fail?

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Integrity	Gets It	Wants It	Capacity to Do It		
Jennifer	+	+	+/-	+/-	✓	✓	✓		
Jennifer	+	+	+	+	✓	✓	✓		
Jennifer	+	+	+	-	✓	✓	✓		
Jennifer	+	+	+	+/-	✓		✓		
Jennifer	+	+	+	+/-	✓		✓		
The Bar	+	+	+	+/-	✓	✓	✓		

Rating: + +/- -

☐ Is Jennifer in the right seat?



# THE PEOPLE ANALYZER™

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Reputation in Mind	Gets It	Wants It	Capacity to Do It
Jennifer	+	+	+/-	+/-	✓	✓	✓
Jennifer	+	+	+	+	✓	✓	✓
Jennifer	+	+	+	-	✓	✓	✓
Jennifer	+	+	+	+/-	✓		✓
Jennifer	+	+	+	+/-	✓		✓



# Pass or Fail?

NAME	Make the Next Person Successful	Go the Extra Mile	Generate Positive Energy	Act with Reputation in Mind	Gets It	Wants It	Capacity to Do It		
Bill	+/-	+/-	+	+/-		✓			
Bill	-	-	+/-	-	✓	✓			
Bill	+/-	+/-	+	-	✓	✓			
Bill	+/-	+/-	+/-	-					
Bill	+/-	+/-	+	+/-	✓	✓			
The Bar	+/-	+/-	+	-	✓	✓			

Rating: + +/- -

☐ Is Bill in the right seat?







# Delegate and Elevate

Be honest!

## DELEGATE AND ELEVATE™

### Love/Great

Big picture planning  
Fixing big problems  
Writing blog  
Learning  
New Ideas / R+D  
Networking  
Sales Process

### Like/Good

marketing / Sales  
Payroll  
Financial digging  
Computer stuff  
Photography

### Don't Like/Good

Budgeting  
Training staff  
Social media  
L.M.A.  
Planning rewards specials  
Website updates  
Customer Satisfaction  
Organizing files

### Don't Like/Not Good

Scheduling  
Graphics



# Why Delegate and Elevate?

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- ☐ Allows you to “let go of the vine”
- ☐ Clarifies the best use of your time
- ☐ Identify RP/RS issues
- ☐ Goal: work in quadrant one



# The Quarterly Conversation

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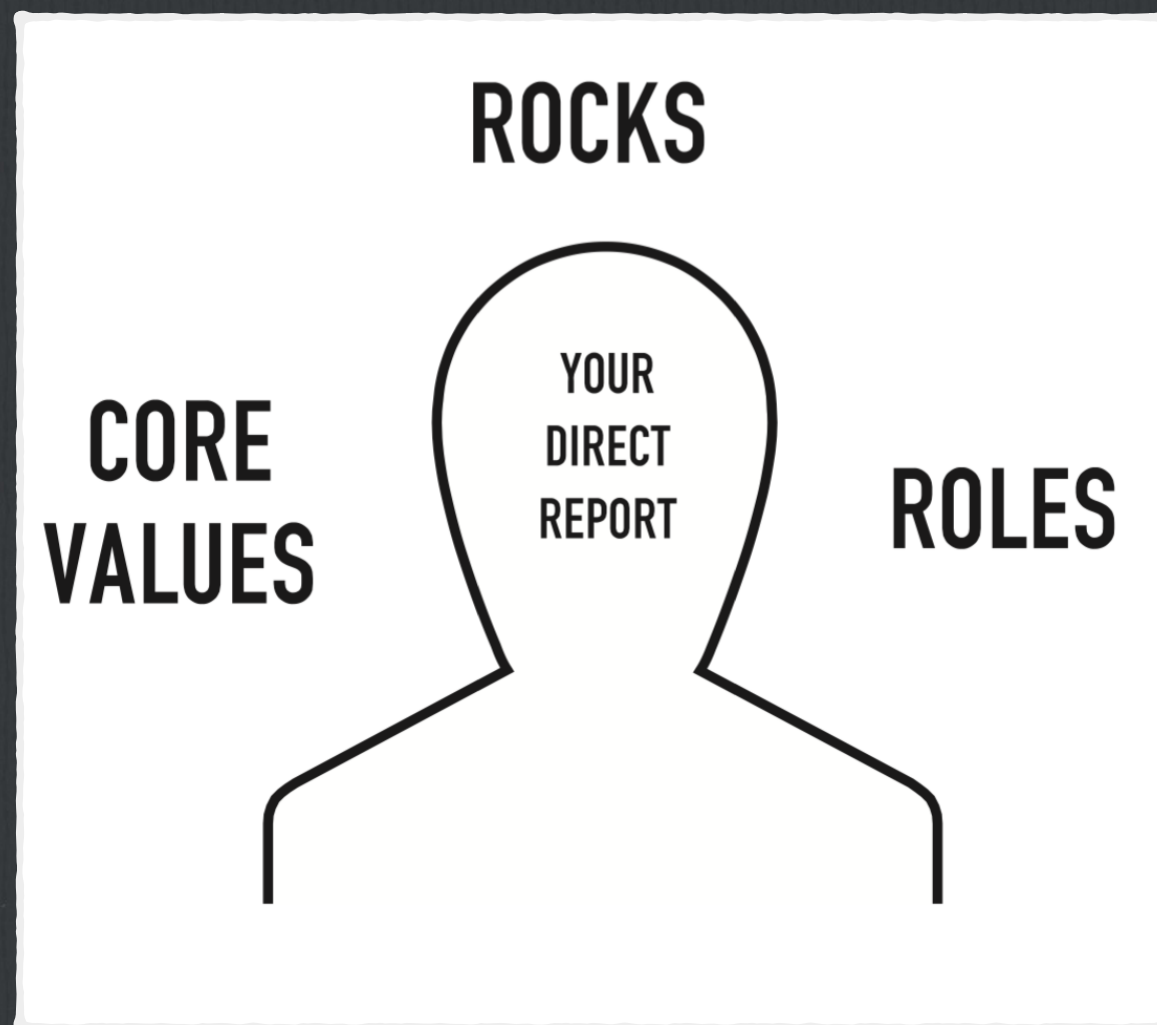
5-5-5





# 5-5-5 Structure

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- ☐ 5 core values
- ☐ 5 rocks
- ☐ 5 accountabilities



# A Quarterly Conversation IS

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- ☐ Casual
- ☐ A conversation - what's working/not working?
- ☐ Off site
- ☐ Structured
- ☐ Scheduled



# **A Quarterly Conversation IS NOT**

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- ☐ **A formal review**
- ☐ **A place for “telling”**
- ☐ **Hours long**



# Recap

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- ☐ **Traction/EOS**
- ☐ **Core Values**
- ☐ **Accountability Chart**
- ☐ **Get It. Want It. Capacity to Do It.**
- ☐ **Delegate and Elevate**
- ☐ **5-5-5**



# Questions



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